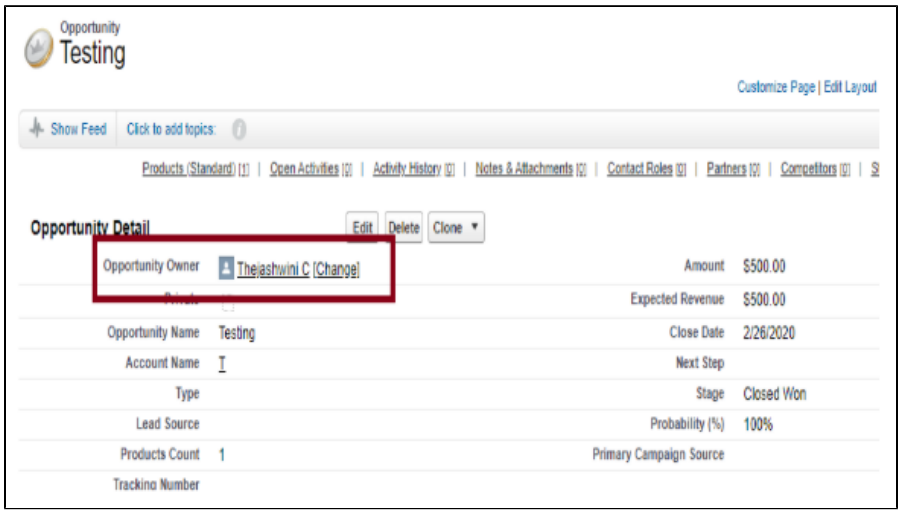
Populate SalesRep on Quickbooks Desktop Invoice from Salesforce Opportunity Owner

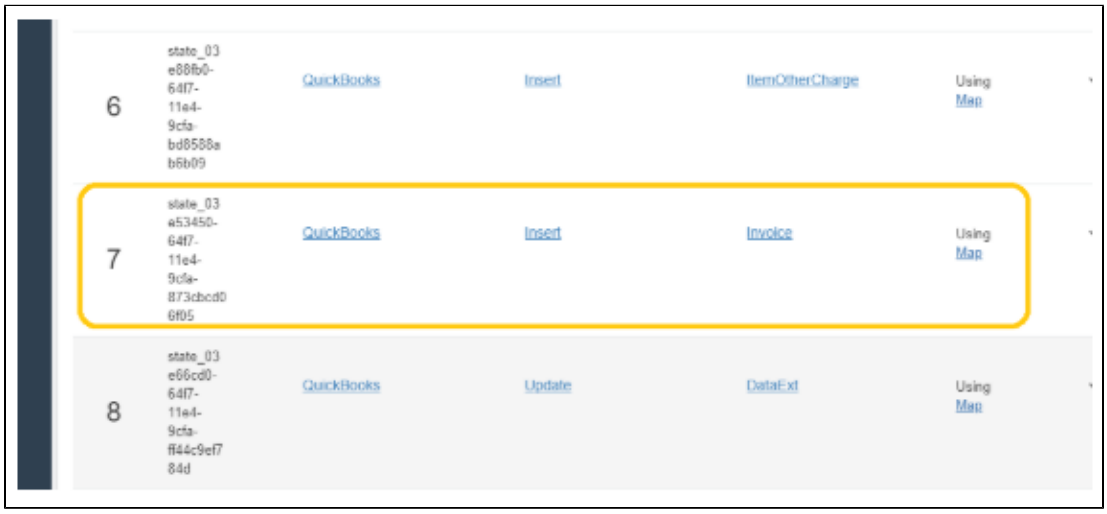
Issue:

The name of the opportunity owner from salesforce to transfer over to the Quickbooks. The “alias” name of the opportunity owner is transferred over to the Quickbooks “rep” field of Invoice.



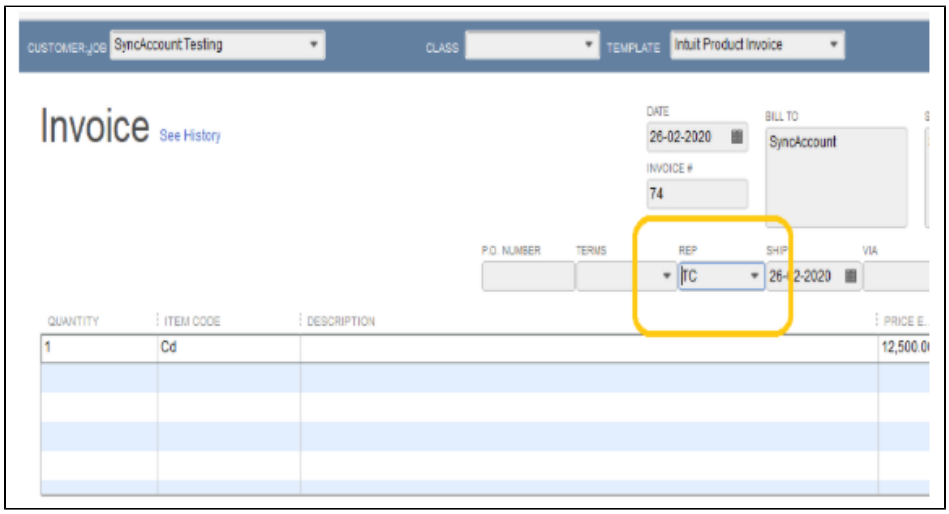
Above, the field is shown for the “OpportunityOwner”. This Alias field of the opportunity owner will be mapped to Quickbooks as a “rep”.

Solution:



To do so, in the OpportunityToInvoice workflow open the mapping for insert invoice and map the “Alias” in the schema to the FullName of SalesRepRef as shown below.

And also, make sure the Alias value should be pre-existing in Quickbooks as a sales rep picklist value.



And Hence, In the above image, we can find the alias name mapped to the Rep field under Invoice in Quickbooks.